



## Micro Surveys

With the ability to create custom surveys with different response types, the micro surveys can be added to any access journey. Once the customer has authenticated, the survey will be presented to them before they can continue and get online. But with options to allow the customer to skip past the survey or make it compulsory. Once the survey has been completed the results will be accessible within the micro survey campaign area.

There are three separate areas to Micro Surveys, you will need to access them in order to get the Micro Survey live. These are:

- **Marketing** – This is where you can create the survey.
- **Onboarding** – We can select the required Micro Survey and add it to an access journey. This will then make the survey live.
- **Campaigns** – Here you can access the results of any completed Micro Surveys.

## Creating Micro Surveys

1. Click Marketing from the left-hand menu, the area will expand.
2. Click **Micro surveys** from the list.
3. The area will load and any existing surveys will be listed. If no surveys have been created the area will be blank.

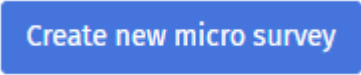
Your micro surveys [Create new micro survey](#)

Survey name	Date created	Owner	Published	
<a href="#">How was your stay?</a>	14/06/2017	Ocean Hotel, Conference Center	Yes	...
<a href="#">Test</a>	31/01/2018	Ocean Hotel, Conference Center	Yes	...
<a href="#">Purple</a>	31/01/2018	Ocean Hotel, Conference Center	Yes	...
<a href="#">Training</a>	06/07/2018	Ocean Hotel, Conference Center	No	...

4. For existing surveys, you will be able to view the following:
  - Survey name
  - Date created
  - Owner
  - Published
5. Each survey will have a menu button at the end, this will allow you can do the following:
  - Delete
  - Duplicate
  - Update (only unpublished)



6. You are able to access any existing micro surveys by clicking the survey name. If the survey has not been published you will be able to edit the contents, if published then no edits will be possible but you can duplicate the survey.



7. You can also create a new micro survey by clicking the button.

8. A small window will open, from here you can name the micro survey and select the ownership level (depending on login level).

The dialog box titled "Create your micro survey" contains a text input field for "Micro survey name". Below it, a section titled "Please select owner level" shows a list of options: "Ocean Hotels Worldwide Inc.", "America", "Ocean Hotel, Santa Barbara", "Ocean Hotel, Santa Maria", and "Ocean Hotel, Conference Center". At the bottom right, there are "Cancel" and "OK" buttons.



9. Once the details are entered, click the button.

10. The screen will update and you will be taken to the micro survey creation page.

The page shows the "Micro surveys" section with a "Training" sub-section. At the top right, there are buttons for "Return to library", "Preview", "Publish survey", "Save", and an information icon. The main area is split into two panels: "Survey questions (4 max)" and "Survey settings".

**Survey questions (4 max):**

- Question 1:**
  - QUESTION (max 98 chars.):** A text input field with the placeholder "Question here".
  - ANSWER TYPE:** Radio buttons for "Rating" (selected), "Multiple choice", and "Text box".
  - ANSWER STYLE:** Radio buttons for "Stars" (selected) and "Circles". The "Stars" style shows a 5-star rating with the 4th star highlighted. The "Circles" style shows a 5-circle rating with the 4th circle highlighted.
- Add question:** A green button with a plus sign.

**Survey settings:**

- Survey name:** A text input field containing "Training".
- Survey introduction text (max 92 chars.):** A text area with the placeholder "Type a short intro to your survey here."
- User can opt out of the survey?:** A toggle switch that is currently turned off.

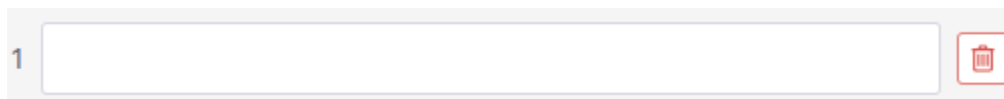


11. You have the ability to add a maximum of four questions, each question can have one of three answer types, these are:

a) **Rating** – Ability to get a rating in either Stars or Circles

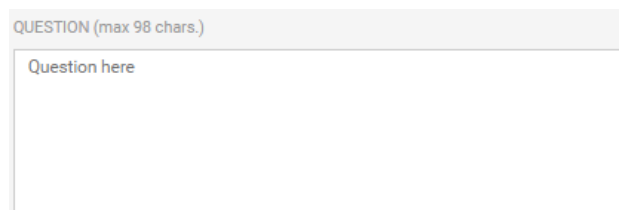


b) **Multiple choice** – With the ability to add a maximum of 5 answers



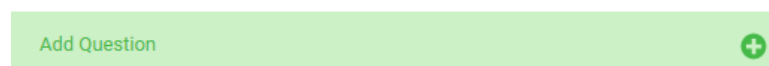
c) **Text box** – A freeform text box will appear for responses when live, nothing will appear on the screen when creating.

12. First, you will need to add the survey question in the empty field box. There is a maximum 98 characters per question.



13. Next select the **Answer Type**, depending on the selection will determine what appears below the question.

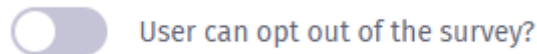
14. To add another question, click the **Add Question** button, then follow the above instruction.



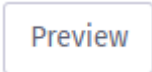
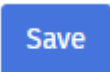
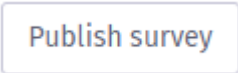
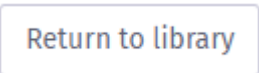
15. On the right of the screen is the Survey name, this can be edited if required. This name will appear at the top of the survey that the customer will see when accessing the micro survey live.



16. You can also add **Survey introduction text**; this is a freeform text box with a limit of 92 characters.
17. Finally, you have the **Opt out** toggle button. This will allow the customer to either skip the survey if switched on or be forced to complete if switch off.



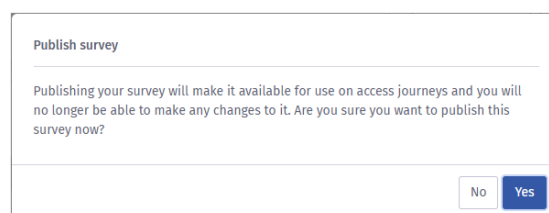
18. Now that the survey contents have been completed, you have a number of options available. These options are:

-  – This will open an additional window showing the survey as the customer would see it.
-  - This will allow the survey to be saved.
-  - This will publish the micro survey so it is available to assign to an access journey.
-  - This will return you back to the library.

19. If you wish to use this survey in an access journey it will need to be published.

20. Click the  button.

- a) A window will open advising that once published, it will be able to use in an access journey but you won't be able to make any changes to the survey, are you sure you wish to publish now.





- b) If you want to make further amendments to the survey, click the  button.



c) If you are happy to publish click the  button.

21. Once published you will be returned to the library and the **Published** column will display as **Yes** for this survey. It is now available to be added to any access journey.

22. When you click into any published survey, the screen will be greyed out so no edits to the content can be made.

23. Any surveys not published can have the details updated. Clicking the menu button  will open the survey options, selecting  **Update** will open a separate window.

24. You will then be able to edit the following:

- Survey name
- Ownership scope

25. Clicking the  button to save any changes.


26. The following message will be displayed

**Micro survey was successfully updated.**

27. To edit an unpublished survey, click the survey name. This will open the edit area so you can make any changes.

28. To delete a journey, click the menu button , the available options will be displayed.

a) Select the  **Delete** button to delete the micro survey.

b) A message will appear asking you to confirm the deletion, click the  button.


Delete micro survey

---

Are you sure you want to delete this micro survey?

Deleting a published micro survey will remove all responses that you may have received from the micro survey.

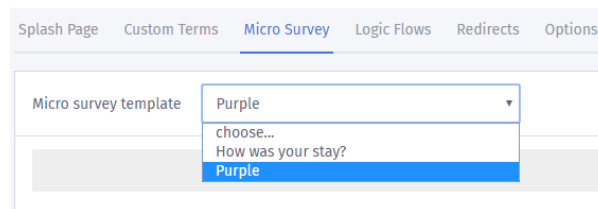
No Yes

29. You can also duplicate any survey by clicking the duplicate  **Duplicate** button. Clicking this option will open the creation window, you can give the survey a new name.

## Assigning to an Access Journey

Now that you have created the micro surveys, you need to make it live. To do this you will need to add the survey to an access journey, either an existing journey or creating a brand-new journey.

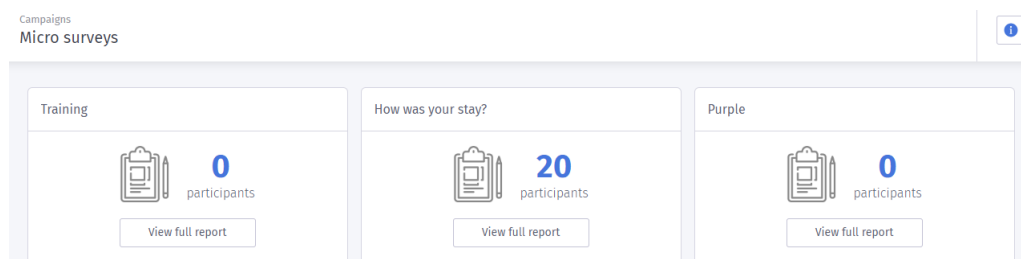
1. Assigning a Micro Survey to an existing unpublished Journey
  - a) Click the required access journey name from the library templates.
  - b) Click the **Micro Survey** tab.
  - c) The screen will load and advise no surveys have been selected, or if one had already been selected it will be displayed on the screen.
  - d) Click the **Micro survey template** drop-down menu.



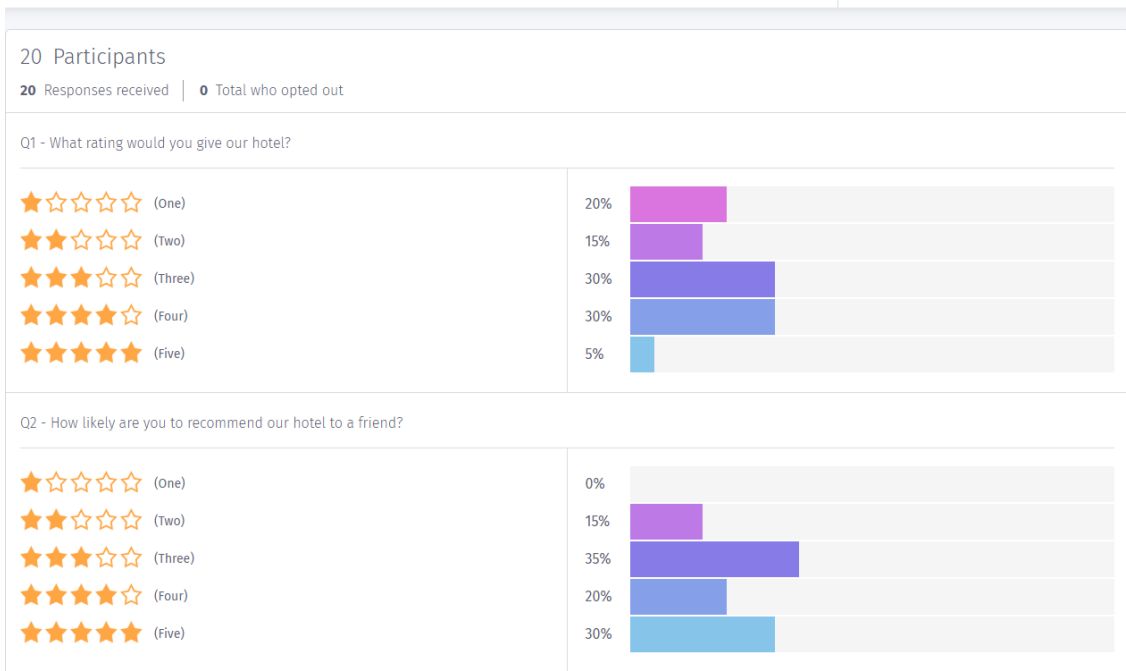
- e) All **Published** surveys will be listed, select to appropriate survey from the list. Only published Surveys will be displayed.
- f) It will then be displayed on the screen to review.
- g) You can now continue with the other access journey options or click the Save or Publish button depending if ready for the journey to go live.

## Micro Survey Report

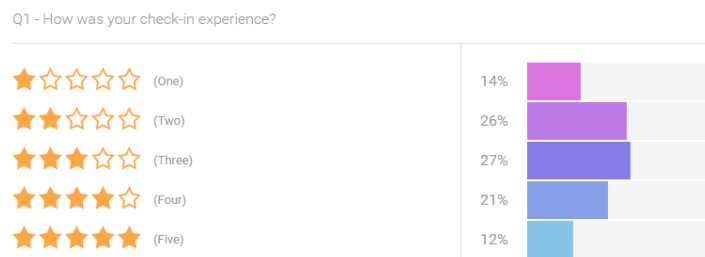
Any Micro surveys assigned to a published access journey will be displayed in this Campaign area. You are able to click into any survey for a full breakdown as required.



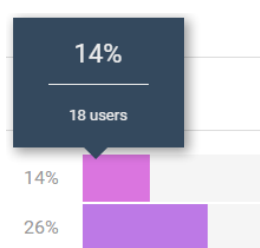
1. Click any micro survey from the overview screen.
2. The page will open and a full breakdown is available.



- At the top of the report the number of **Participants** will be displayed along with the number of **Responses received** and **Total skipped**.
- The questions created within the survey will then be displayed along with the relevant results received.
- For **Rating** questions, you will have the 1-5 stars listed and to the right the percentage of people who selected that rating.

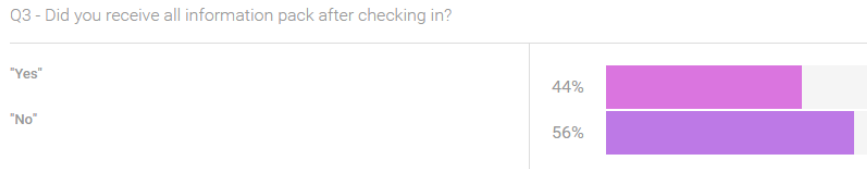


- Hovering your mouse over the percentage will display a box containing the percentage but also the number of participants.





- 7. For **Multiple choice** questions the answers specified will be displayed and again the percentage of customer who selected that answer.




- 8. For **Text box** questions the question will be displayed and below a breakdown of the responses. The information will be broken down into four different columns. These are:
  1. Date
  2. Venue
  3. Response

Q4 - What could we do to improve your stay? View

Date	Venue	Response
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Id like to see more staff on the door to greet you.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Your staff were really polite but I didnt feel like they asked me enough if I was enjoying my visit.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	In general the toilets were clean but there were a couple of days where they could have been better.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	I cant think of anything - you guys rock!

- 9. When you scroll through the results, the first 20 will be displayed.



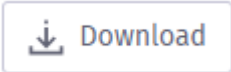
- 10. To view the full list, click the  button, this will open another window and display all the results.



Q4 - What could we do to improve your stay? View

Date	Venue	Response
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Id like to see more staff on the door to greet you.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Your staff were really polite but I didnt feel like they asked me enough if I was enjoying my visit.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	In general the toilets were clean but there were a couple of days where they could have been better.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	I cant think of anything - you guys rock!
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Providing a better selection of snacks would be appreciated.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Some of the baked goods were not warmed through
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Service was great.
2016-09-13 07:59:59	Ocean Hotel, Conference Center	Room service was quite basic compared to the rest of the hotel.

11. Clicking the  button to close the window

12. You also have the option to download the results, clicking the  button will display the available download options.

a) Either download as PDF or CSV.

**Download this report**

Download PDF now

Download CSV now

b) **PDF** - will download but will not show any text box responses.

c) **CSV** - will download all the information

d) Click the  button to return the micro survey overview screen